The Secrets of Virtual Facilitation

Adapted from Leadership Strategies’ course, Facilitating Virtual Meetings, and CLICK: The Virtual Meetings Book

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The Facilitation Company

Session Objectives

By the end of this session, you will be able to:
1. Use the 6 Ps to prepare for a virtual session, including selecting an appropriate virtual tool.
2. Implement a variety of engagement strategies for virtual interaction to keep participants engaged – not multi-tasking.
3. Use specific ground rules for virtual sessions.

Standing Poll

How many virtual meetings/sessions have you led or attended in the last 3 months?
- None
- Between 1 and 10
- Between 11 and 25
- Over 25

Why are Virtual Sessions So Different?

1. Getting them to see what they can only hear.
2. Keeping them engaged … when they know you can’t see them.

...Special Virtual Meetings

- 1 person is remote and everyone else is present
- Everyone is remote, no one is local
- Everyone is present except you, the meeting leader

Virtual Reality

- 56% said that their organization had held more virtual meetings in the past 12 months than they had in the previous 12 months.
- 75% of respondents said they participated in virtual meetings from their car.
- Only 40% indicate they are very comfortable using virtual meeting tools.
- 93% indicated multi-tasking is an obstacle to successful virtual meetings.

Because We Only Have 1.5 Hours...

- Leave your business card to get two white papers, The 10 Principles of Facilitation and the 2013 Virtual Survey.
- See me at the bookstore following the session!
Who is Leadership Strategies?

- Leading provider of facilitators and facilitation training
- Over 500 facilitators under contract (FindaFacilitator.com)
- The most Certified Master Facilitators
- Public classes in Atlanta, Atlantic City, Boston, Chicago, Dallas, DC, Denver, Houston, Los Angeles, Las Vegas, NY, Orlando, Phoenix, San Francisco, Seattle, Sydney, Toronto
- Private classes on your site.
- Over 19,000 trained in facilitation skills through The Effective Facilitator
- Authors of CLICK: The Virtual Meetings Book

II. The Virtual Dilemma

Face-to-Face Training

<table>
<thead>
<tr>
<th>WHAT</th>
<th>HOW</th>
<th>WHY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Content</td>
<td>Delivery Methodology</td>
<td>Benefit</td>
</tr>
<tr>
<td>The concepts, tools, techniques, and strategies.</td>
<td>The methods the facilitator will use to deliver the content described (e.g., case study, role play, breakout, discussion, etc.)</td>
<td>Why should the participants care? Why should this be important to them?</td>
</tr>
</tbody>
</table>

Today’s Agenda

I. Getting Started
II. The Virtual Dilemma
III. Preparing for the Virtual Session
IV. Starting the Virtual Session
V. Running the Virtual Session
VI. Managing Dysfunction Virtually
VII. Review
VIII. Next Steps

The 6 Cs of Learning Transfer

1. Define the business outcomes: training to achieve a goal, satisfy a need or solve a problem?
2. Design the complete experience
3. Deliver for application: both theory and practice
4. Drive learning transfer: don’t fill the box, ignite a fire
5. Deploy performance support
6. Document results; be a business partner
II. The Virtual Dilemma

Virtual Sessions
• It’s all about: ENGAGEMENT!

How do you achieve similar or better levels of engagement as you would if face-to-face?

Meaningful engagement every 10-15 minutes!

Engagement Tools for the Virtual Environment.
• Polls
• Whiteboards
• Slideboards
• Desktop Sharing
• Round Robins
• Chat box

Polls

How many facilitated sessions have you led or attended in the last twelve months?

- More than 20
- 10 to 19
- 5 to 9
- Less than 5
- Don’t know

Engagement Tools for the Virtual Environment.

Whiteboards

Meeting Feedback

Likes
• Carla K: Better communication
• Tony J: Work smarter not just harder
• Joe D: Great approach
• Rob P: Getting it done now
• Bernard L: Involve everyone
• Pamela G: Structure

Ways to Improve
• Tina H: Overview and results
• Mary R: The Drivers Model
• Fran T: We are working to come and
• Don’t know

Engagement Tools for the Virtual Environment.

Slideboards

Parking Boards

Decision: Action

Engagement Tools for the Virtual Environment.

Desktop Sharing

PowerPoint

- C. Agenda

- G. What will we do today and what will we do after the meeting?
- F. will we do if we are asked to continue?
- D. What role do we have in this meeting?
- E. Will we have a follow-up meeting?

Understanding the Needs of the Audience
II. The Virtual Dilemma

Engagement Tools for the Virtual Environment.

Round-Robins
- Using a roll call list, round robins and mini round robins are an effective way to engage the participants during a virtual meeting.

| V | Andrea, Atlanta |
| V | Bill, Boston    |
| V | Cleve, Chicago  |
| V | Ken, Dallas     |
| V | Trina, Denver   |
| V | Vanessa, San Diego |
| V | Kathy, Atlanta (project manager) |

Chat Box

A. Getting Started
B. Key Topics to Discuss
1. Please type your key questions in the chatbox.

The 10 Principles of Facilitation

- Principle 1. PREPARING FOR SUCCESS
  Cover All the Bases
- Principle 2. GETTING THE SESSION STARTED
  Inform, Excite, Empower, Involve
- Principle 3. FOCUSING THE GROUP
  Establish the Course Avoid Detours
- Principle 4. RESPECTING THE POWER OF THE PEN
  Use It, Don’t Abuse It, Make It Theirs
- Principle 5. INFORMATION GATHERING
  Know Your Tools and How to Use Them

The Facilitator’s Methodology

Facili-Training

The Facilitation Cycle

1. Preparing for Success
2. Getting the Session Started
3. Focusing the Group
4. Information Gathering
5. Managing Dysfunction
6. Consensus Building
7. Keeping the Energy High

Group Dynamics

The Power of the Pen

Closing the Session

Agenda Setting
Standing Poll

Assume that you have a dozen people that you want to become better at running virtual sessions. What would you want the training to focus on?

A. Using the Virtual Tool
B. Facilitating Virtual Sessions

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III. Preparing for the Virtual Session

The 6 Ps of Preparation:

1. **Purpose** – Why are we having this session?
2. **Product** – What do we need to have when we are done?
3. **Participants** – Who will be attending? What are their attitudes?
4. **Probable Issues** – What issues will be addressed?
5. **Process** – What steps will get us there?
6. **Place** – How will you effectively utilize your virtual meeting environment/platform?
Choosing the Virtual Platform

Your group’s level of engagement and productivity is impacted by:
- The participants’ motivation
- The meeting leader’s energy and skills
- The engagement strategies used
- The session content
- The capabilities of the virtual platform

Choosing the Virtual Platform – Levels of Engagement

1. **Face-to-Face**: People can hear one another, see one another, view the same information, provide written input at the same time, and work in sub-teams, fully observe non-verbal communication, and physically interact (e.g., shake hands).

2. **Audio, Video and Desktop Sharing, White Board and Breakout Groups**: People can hear one another, see one another, view the same information, provide written input at the same time, and work in sub-teams.

3. **Audio and Desktop Sharing**: People can hear one another and see the same information.

4. **Audio Only**: People can hear one another (conference call).

Choosing the Virtual Platform – Product Tiers

1. **Full Features**
   - Includes basic features such as video and desktop sharing, as well as advanced features such as annotation, breakouts, polling, and whiteboards.

2. **Basic Features**
   - Includes basic features such as video and desktop sharing, but typically does not include one or more of the following: annotation, breakouts, polling, and whiteboards.

3. **Limited Features**
   - Excludes one or more basic features such as video or desktop sharing, or supports fewer than fifteen users.

4. **Special Purpose**
Choosing the Virtual Platform – Product Tiers

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3. Limited Features
   - Excludes one or more basic features such as video or desktop sharing, or supports fewer than fifteen users.

4. Special Purpose
   - Provides features for a special purpose or a special audience.

### Example of Choosing the Virtual Platform

<table>
<thead>
<tr>
<th>Why</th>
<th>What</th>
<th>Constraint</th>
</tr>
</thead>
<tbody>
<tr>
<td>To maximize engagement, need annotation, breakout rooms, polling, or whiteboard.</td>
<td>√</td>
<td>Must</td>
</tr>
<tr>
<td>To increase productivity, need everyone to see one another and to see leader’s desktop.</td>
<td>√</td>
<td>Must</td>
</tr>
<tr>
<td>More than 25 people need to attend the virtual meeting at the same time.</td>
<td>√</td>
<td>Must</td>
</tr>
</tbody>
</table>

The virtual meeting platform must be free. | √ | Eliminate | Eliminate |
Preparation Agenda... and Detailed Agenda

A. Getting started
  - Process
    - List the key topics participants want to discuss; group the topics into categories.
    - Have participants record their key topics on the whiteboard. Move items on whiteboard into groups.

B. How does it work today?
  - Virtual Details
    - Timing: 10 minutes (2 + [12 issues x 0.5] + 2)

C. Strengths / areas for improvement
D. Potential improvements
E. Priorities
F. Implementation plan
G. Close

Using Special Virtual Ground Rules

- Announce yourself when joining and if leaving early.
- Identify yourself before speaking until voices are familiar.
- Avoid the “hold” button, especially when music or other sounds result.
- Use consistent order of speakers.
- Stay 100 percent focused during the meeting; avoid doing other work, answering e-mails, etc.
- Remember the remote.

Preparation the Virtual Meeting Environment

- Set up the virtual meeting room.
- Distribute the virtual meeting invitation.
- Hold a software prep for the facilitator, if necessary.
- Hold a software prep session for participants to review typical challenges, if necessary.
- Use a moderator when appropriate

Do You Need a Moderator?

- Assist with chat rooms, polling questions, documentation, maintaining the parking boards.
- Support all technical issues.
- Other considerations:
  - Monitoring activity
  - A second voice for variety
- Recommended if eight or more people.

The Roll Call List

During the virtual meeting, you will frequently invite each person to speak on a topic (round-robin).
- Prepare a list of participants and locations to use to check-off who has spoken.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>V</td>
<td>Andrea, Atlanta</td>
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<tr>
<td>V</td>
<td>Kathy, Atlanta (project manager)</td>
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Handling Difficult “Room” Setups

What if there are only a few virtual participants?

- Issue: Virtual participants feel isolated and uninvolved
- Actions:
  - Send handouts in advance to remote participants.
  - Have webcam of room and remote participants.
  - Use whiteboards or desktop sharing to show information gathered during the meeting.
  - Consider ground rules such as “Don’t forget the remote.”
  - Start round robins with remote participants
Handling Difficult “Room” Setups

What if most are virtual?
- Issue: Due to the inability to “read the participants” as well, the tendency is a lack of engagement during sessions with many virtual participants
- Actions:
  - Use round robins maintaining the same order each time.
  - Use whiteboards allowing remote participants to annotate the whiteboards.
  - Use engagement activities such as “the whip.”

Actions:
- Use round robins maintaining the same order each time.
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Checklist for Preparing

- Decide the meeting’s purpose.*
- Define the meeting’s products.*
- Confirm meeting is necessary.*
- Select the participants.*
- Identify probable issues.*
- Develop the process (agenda).*
- Choose the virtual platform.*
- Determine methods and timing.
- Determine meeting rooms, date, and time.*
- Develop and distribute the meeting notice.*
- Hold preliminary discussions beforehand, as needed.
- Prepare the virtual meeting room.*
- Articulate your ground rules.
- Prepare a roll of participants.
- Prepare your opening words.
  * Recommended for all meetings

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Standing Poll: True or False?
After introductions if necessary, meetings should generally start with a review of the agenda.
- Answer: FALSE!
- Why:
  Start with purpose. (Remember the first “P” of the 6 Ps of Preparation!)

IV. Starting the Virtual Session
Set the Stage With Your Opening
- Every time you bring your virtual team together, you must do four things...right from the very beginning.
IV. Starting the Virtual Session
Set the Stage With Your Opening

- Through your opening words, you must ... 
  - **Inform** participants about the purpose and product.
  - “The purpose of this meeting is... When we are done, we will have...”

- **Innovate**
- **Empower**
- **Involve**

---

- Through your opening words, you must ... 
  - **Excite** participants about benefits.
  - What is the overall result to be achieved? WII-FM?

- **Innovate**
- **Empower**
- **Involve**

---

- Through your opening words, you must ... 
  - **Empower** participants by discussing the important role they play in the process.
  - Why were they selected? What authority have they been given?

- **Innovate**
- **Empower**
- **Involve**

---

- Through your opening words, you must... 
  - **Innovate** participants through personal objectives and participation.
  - “What are the key topics you want to make sure are covered in this session?”

- **Innovate**
- **Empower**
- **Involve**

---

- Which are we best at?
- Which are we worst at?
- Let’s look at 2 examples

- **Innovate**
- **Empower**
- **Involve**

---

**Excite Example #1**

- Good morning, it’s a pleasure to be here this morning.
- Our objective for the next two days is to walk away with a plan for improving the hiring process (inform).
- What is exciting about this?
- If we are successful, we will walk away with a new hiring process that will help our organization get the right people hired and get them hired quickly.
Excite Example #2

- Good morning, it’s a pleasure to be here this morning.
- Our objective for the next two days is to walk away with a plan for improving the hiring process (inform).
- What is exciting about this?
- Today you may have people on your staff who don’t have the skills or the attitude you need. As a result, you are having to work much harder to make up for what they aren’t doing. This is your opportunity to put strategies in place to ensure that you get the people you need to get the work done.

Which is better? Why?

Example 1
- If we are successful, we will walk away with a new hiring process that will help our organization get the right people hired and get them hired quickly.

Example 2
- Today you may have people on your staff who don’t have the skills or the attitude you need. As a result, you are having to work much harder to make up for what they aren’t doing. This is your opportunity to put strategies in place to ensure that you get the people you need to get the work done.

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IV. Starting the Virtual Session
Set the Stage With Your Opening

With Excite:

Say “you” or “your” at least 4 times!

Employ All Your Best Presentation Techniques

- Turn on your webcam for remote participants to see you
- Sit tall, don’t slouch
- Speak loudly and clearly; vary your tone and emphasis
- Avoid speaking too fast or too slow; vary your rate of delivery
- Be animated
- Make eye contact using the webcam
- Use defined gestures
- Avoid “self-talk”; avoid filler words (e.g., “ah,” “um”)
- Avoid extremes in dress and grooming
- Ensure your facial expressions match what you are saying

Checklist for Starting

- Start the meeting on time.
- Deliver the opening, include purpose and products.*
- Perform a roll call.*
- Engage the participants.
- Confirm the agenda.*
- Review the ground rules.
- Review the parking boards.
- Make introductions, if needed.

* Recommended for all meetings
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Set the Course with Checkpoints

At the beginning of each facilitated process...

- REVIEW
- PREVIEW
- BIG VIEW

Set the Course with Checkpoints

- Review
  - Review quickly what has been done to date.
- Preview
  - Describe briefly what the group is about to do.
- Big View
  - Explain how the previewed agenda item fits into the overall objective of the session.

Sample Agenda

Purpose:
Define the changes necessary to increase the efficiency and effectiveness of the hiring process.

Agenda:

- A. Introduction
- B. How does it work today?
- C. What are the problems and root causes
- D. What are the potential improvements
- E. Prioritize improvements
- F. Develop implementation plan
- G. Review and close

Standing Poll: True or False?

When formulating questions to get lots of ideas, the most important attribute of the question is that it is open-ended.

- Answer: FALSE!
- Why:
  - The key is to formulate a question that helps the participants visualize the answers!

The Starting Question

You are interviewing a group of school registrars to talk with them about the scheduling process.

Which is the better starting question? Why?

Question Type A
- The first thing we want to talk about are inputs.
- What are the inputs to the scheduling process?

Question Type B
- Let’s start with... If you were about to develop the school schedule, what is the information you would need to have close by?

What the facilitator wants to know
- Draws an image of the answers
Ask Great Starting Questions

Four parts to great starting questions in virtual sessions:
1. **Notify who will start responding** (Why is this so important in the virtual setting?)
2. **Begin with an image-building phrase** (“think about,” “consider,” “if”)
3. **Extend the image to the answers** (at least two phrases)
4. **Ask the direct question** (Type A) to get the information you want

---

Ask Great Starting Questions

Scenario: You want the participants to identify the steps in the hiring process.

**What is the Type A question?**
- “What are the steps in the hiring process?”

**What image-building phrase can you use?**
- “Think about the last time you hired someone.”

**How do you extend the image to the answers?**
- “Think about all the things you had to do to get that person hired, all the steps you had to go through, all the people you had to talk with, the forms and everything…”

---

Ask Great Starting Questions

Scenario: You want the participants to identify the steps in the hiring process.

**The Type B Question**
- “We will start this with… Think about the last time you hired someone. Think about all the things you had to do to get that person hired, all the steps you had to go through, all the people you had to talk with, the forms and everything… What are the steps in the hiring process?”

---

Ask Great Starting Questions

- **When do you use a Type B?**
  - At the beginning of every agenda item
  - It takes preparation!
  - If you don’t prepare, you will most likely use a Type A
  - Create a list of Type B questions for the standard sessions you facilitate.

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Standing Poll: True or False?

It’s best if NO dysfunctions occur during a meeting.

**Answer:** TRUE!

- **Why?** The best dysfunctions are those that don’t occur.
Dysfunctional Behavior

As the degree of the dysfunction increases, the severity of the disruption caused by the dysfunction increases as well.

- Physically attacking someone
- Leaving the room in disgust
- Verbal attack directed at a participant
- Negative comments about a participant
- Audible sighs of displeasure
- Negative physical reactions
- Doing other work in the session
- Side Conversations
- Folded arms, facing door or windows
- Silence, lack of participation
- Arriving late, leaving early

Understanding Dysfunctional Behavior

Dysfunctional behavior is any activity by a participant that is consciously or unconsciously a substitution for expressing displeasure with the session content, the facilitation process, or an outside factor.

Separate Symptom from Root Cause

- Treat dysfunctional behavior as a sign that the participant is asking for help
- The participant is waving a red flag that is masking the real issue (root cause)
- Dysfunctional behavior is a symptom
- Dysfunctional behavior tends to get worse over time

Address Dysfunction Effectively

The general formula for addressing dysfunction:

- Approach privately or generally
- Empathize with the symptom
- Get agreement on a solution
- Address the root cause

Dysfunctions

- Late Arriver / Early Leaver
- Drop-out*
- Loudmouth
- Storyteller
- Broken Record
- Chatter*
- Workaholic
- Verbal Attacker
- Door Slammer
- Physical Attacker

Dealing with Virtual Dysfunction Types

<table>
<thead>
<tr>
<th>Dysfunction</th>
<th>Suggested Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drop-out</td>
<td>- Remind the group of ground rules. (Everyone speaks.)</td>
</tr>
<tr>
<td></td>
<td>- Employ a round-robin brainstorming activity to get everyone involved.</td>
</tr>
<tr>
<td></td>
<td>- Do a mini round-robin.</td>
</tr>
<tr>
<td></td>
<td>- Discuss privately during break to ensure there is not an additional problem.</td>
</tr>
</tbody>
</table>
Dealing with Dysfunction Types

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Nay-sayer</td>
<td>Say with optimism, or jokingly, “It appears that we have some concerns about this alternative. Let’s talk about it. What are the issues?”</td>
</tr>
<tr>
<td></td>
<td>Seek buy-in by asking, “How can you make it better?”</td>
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<tr>
<td></td>
<td>At the break, attempt to reach a solution in which the person will openly speak about concerns during the group session.</td>
</tr>
<tr>
<td></td>
<td>Be sure to get all the issues out.</td>
</tr>
</tbody>
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DONE! Review Session Objectives

1. Use the 6 Ps to prepare for a virtual session, including selecting an appropriate virtual tool.
2. Implement a variety of engagement strategies for virtual interaction to keep participants engaged – not multi-tasking.
3. Use specific ground rules for virtual sessions.

Dealing with Dysfunction Types

<table>
<thead>
<tr>
<th>Dysfunction</th>
<th>Suggested Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chatter</td>
<td>Remind the group of ground rules (Respect the speakers)</td>
</tr>
<tr>
<td></td>
<td>Discuss privately during break to ensure there is not an additional problem.</td>
</tr>
</tbody>
</table>

Review: Secrets of Virtual Facilitation

- The What, the Why, the How
- 6 Do’s of Learning Transfer
- Polls
- Whiteboards
- Slideboards
- Desktop Sharing
- Round Robins
- Chat Box
- ED=RDxD
- 10 Facilitation Principles
- 6 Ps of Preparation
- Choosing the Platform
- Detailed Agenda for Virtual
- Ground Rules for Virtual
- Preparing the Virtual Environment
- Using a Moderator
- Roll Call List
- Difficult “Room Setups”
- Checklist for Preparing
- Inform, Excite, Empower, Involve
- Checkpoint
- Great Starting Question
- Defining Dysfunction
- Addressing the Dropout
- Addressing the Nay-sayer
- Addressing the Chatter

IX. Next Steps

What’s Next? Learn More...

HANDS-ON FACILITATING
- Facilitating Virtual Meetings: Comprehensive
- Facilitation Skills for Trainers
- The Effective Facilitator

THE BOOK (See you at the bookstore!)
- CLICK: The Virtual Meetings Book

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- http://www.leadstrat.com/virtualbooth
- Articles and a coupon for 10% off CLICK: The Virtual Meetings Book

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